



COMMUNITY VISION

STRATEGY ROADMAP

2025–2028 STRATEGIC PLAN

PREPARED BY

La Piana
DRIVING SOCIAL IMPACT since 1998

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SECTION 1
**EXECUTIVE
SUMMARY**



OVERVIEW OF OUR STRATEGIC GOALS

By expanding our current initiatives and introducing new programmatic possibilities, we aim to enhance community ownership of assets. In line with our [Theory of Change](#), our strategic plan will help us support community-rooted nonprofits and businesses to purchase, preserve, and develop social purpose real estate.



Goal 1

Enhance Our Impact:

Driving Land Justice through Effective Programming



Goal 2

Forge New Pathways:

Creating Innovative Initiatives to Support BIPOC-Serving Organizations



Goal 3

Cultivate Excellence:

Fostering a Unified and Client-Centered Organization for Lasting Impact



SECTION 2

OUR IMPACT

OUR MISSION, VISION & THEORY OF CHANGE

As part of our strategy development process, we updated our mission and vision statements. These statements, along with our Theory of Change ([full document linked here](#)), capture our core values and aspirations as an organization that strives for community ownership of community assets.

OUR MISSION

We advance racial and economic equity, land justice, and community ownership by delivering flexible capital and responsive advising.

OUR VISION

We envision a California where all communities—regardless of race or income—equitably control real estate as a path to agency, self-determination, and power

OUR THEORY OF CHANGE

Because discrimination in land ownership and control has played a central role in perpetuating racial and economic inequality, we work to advance Community Ownership of Community Assets. To us that means supporting community-rooted nonprofits and businesses to purchase, preserve, and develop social purpose real estate that:

- Delivers healthcare, education, and human services
- Provides affordable and supportive housing
- Fosters cultural expression
- Builds incomes and wealth

So that our clients achieve stability and scale, and communities of color and low-income communities achieve justice, power, and equity.



OUR DIFFERENTIATING STRENGTHS

We have a strong track record of collaborating with BIPOC-led nonprofits, investors, funders, partners, and local governments to create innovative and inclusive solutions that center the needs and values of the diverse communities we serve. We have a unique real estate expertise in the CDFI landscape. We are more than just a lender. We are a team of committed lenders, advisors and community developers who combine real estate expertise, capital access, and consulting services to support nonprofits and BIPOC communities in owning their assets and shaping their futures.

We have a legacy of successful partnerships and programs that center equity, justice, and sustainability, and a reputation of engaging in authentic, inclusive, and relational partnerships with our peers and clients.

We are committed to supporting access to the resources and opportunities communities need to thrive.

OUR STRATEGIC GOALS & PRIORITIES

Goal 1

Enhance Our Impact:

Driving Land Justice
through Effective
Programming

Goal 2

Forge New Pathways:

Creating Innovative
Initiatives to Support BIPOC-
Serving Organizations

Goal 3

Cultivate Excellence:

Fostering a Unified and
Client-Centered Organization
for Lasting Impact

2025–2028 STRATEGIC GOALS

Goal 1 **Enhance Our Impact:**

Driving Land Justice through Effective Programming

Priorities

- Deepen our capabilities to advance community-led, social purpose real estate projects – in particular, community facilities
- Strengthen the programmatic continuum between Capital Solutions and Real Estate Solutions to offer a holistic community ownership toolkit
- Leverage and expand organizational partnerships to strengthen the social purpose commercial real estate ecosystem
- Create and refine loan products that will catalyze real estate acquisitions in low- and moderate-income communities, particularly projects led by people from those communities

2025–2028 STRATEGIC GOALS

Goal 2 **Forge New Pathways:**

Creating Innovative Initiatives to Support BIPOC–Serving Organizations

Priorities

- Create and implement a systematic structure for exploring and launching sustainable programming that responds to community priorities for community assets and land control. Focus areas include:
 - **Climate Resilience:** Offer financing and technical assistance support for climate resilient real estate in low- and middle-income communities and communities of color
 - **Deepen Geographic Engagement:** Identify new, financially sustainable opportunities to deepen our work in low-income communities that have been chronically underinvested
 - **Affordable Housing:** Explore new approaches to support affordable housing development, including engagement with the affordable housing ecosystem and Capital Solutions and Real Estate Solutions
 - **Generational Wealth Building:** Assess opportunities to support individual and family wealth building as a compliment to community wealth building, including programming on commercial real estate ownership for mission-aligned small businesses, cooperatives, and other forms of worker-directed businesses
- Support federal, state, and local policies that advance community ownership of community assets

2025–2028 STRATEGIC GOALS

Goal 3 **Cultivate Excellence:**

Fostering a Unified and Client-Centered Organization for Lasting Impact

Priorities

- Evaluate and respond to the organization’s evolving business model, that includes exploring the opportunities and challenges of a state-wide approach
- Create and execute a loan fund capitalization plan and organization revenue plan that align with our strategic objectives, market analysis, and intended impact
- Foster a values-driven culture and collective commitment to our work, our internal collaboration, our clients, and our communities
- Enhance and sustain a robust learning and evaluation framework that reflects our intended community impact
- Continuously improve our internal processes, communications, protocols, and approaches across all departments by creating, updating, or formalizing where necessary



SECTION 3

THE STRATEGY DEVELOPMENT PROCESS

PROCESS OVERVIEW

From Winter 2023 to Fall 2024, Community Vision engaged La Piana Consulting to support an inclusive strategy development process that intentionally incorporated participation from board, leadership, staff, clients, and partners.

A Strategy Team led the initiative, involving the wider staff, board, and external stakeholders in multiple discussions to assess Community Vision's competitive advantage, identify opportunities for impact, develop a new mission and vision statement, and create organizational alignment around emerging goals and priorities.

Special thanks to our Strategy Team members for providing their time and insights into the strategy development process.

- Andy Madeira, Board Member
- Anita Addison, Board Member
- Catherine Howard, President
- Eddy Lopez, Jr., Senior Investor Relations Associate
- Jacqueline Carlisle, Senior Real Estate Consultant
- Joi Eubanks, Community Development Officer
- Luisa Medina, Board Member
- Nate Schaffran, Director of Policy & Impact
- Nikki Beasley, Board Member
- Saul Ettlin, Senior Advisor

PROCESS OVERVIEW: ACTIVITIES & LEARNINGS

Key Activities

- Confirmed organizational strengths, opportunities, and challenges
- Conducted interviews, focus groups, and townhall meetings with leadership, staff, board, partners, and clients
- Created strategy decision-making criteria
- Gathered staff, board, and Strategy Team for interactive, in-person strategy development retreat
- Refined emerging strategy based on feedback and ongoing conversations
- Conducted working sessions with staff to develop concrete actions to implement organizational priorities

Key Learnings

- Community Vision is at an inflection point, needing to grow strategically in order to achieve economies of scale or else to right size work within the constraints of available funding
- There is an interest in going deeper into place-based work to promote capacity building and reaching target communities and expand our reach through strategic partnerships
- It is important to determine if Community Vision's model replicable across different ecosystems and communities
- Strengthening internal systems and processes can build important efficiencies for Community Vision as it evolves
- There is strong alignment across Community Vision's board and staff on the future direction and impact of the organization

STRATEGY SCREEN

A strategy screen is a tool that helps organizations evaluate strategies and opportunities by considering factors such as mission, competitive advantage, and current situation.

It is not a rigid framework, but rather a guide to help us make informed, transparent, and mission-aligned decisions. On the right are the criteria used to inform the content of this plan and that will continue to shape our work moving forward.

STRATEGY SCREEN CRITERIA

When making a key strategic decision, we ask ourselves...

To what extent does this decision:

- Align with our theory of change and strategy?
- Advance racial equity?
- Contribute to the financial sustainability of the organization?
- Meet a community real estate need?
- Leverage our real estate expertise and what we are best positioned to do?
- Consider the opportunity costs?
- Allow us to remain deep rooted and relational?
- Allow us to work with / positively impact our target audiences?

GLOSSARY OF TERMS

THESE ARE TERMS WE USE TO DEFINE OUR WORK

- **BIPOC Communities:** BIPOC stands for Black, Indigenous, and People of Color. These are communities that include individuals from historically marginalized racial and ethnic groups, particularly Black, Indigenous, Latinx, Asian, Pacific Islander, and other people of color. The term emphasizes the distinct experiences of Black and Indigenous people with systemic racism, while also recognizing the broader diversity of racialized groups.
- **BIPOC Led Organization:** These are organizations where the majority of leadership positions, such as executive directors, board members, and other key decision-makers, are held by individuals from BIPOC communities.
- **BIPOC Serving Organization:** Organizations that focus on providing programs, services, and resources designed to meet the specific needs and priorities of BIPOC communities.
- **Client-Centered:** A client-centered approach places the needs, experiences, and well-being of the client at the core of service delivery. It emphasizes respect, empathy, and partnership with clients, ensuring their voices, preferences, and autonomy guide decisions and processes. In a nonprofit context, it means designing programs and interventions that prioritize the clients' goals, cultural backgrounds, and unique circumstances.
- **Community-owned business:** An enterprise that is owned and operated by members of a community, with the goal of benefiting that community.

GLOSSARY OF TERMS

THESE ARE TERMS WE USE TO DEFINE OUR WORK

- **Community ownership of community assets:** Ownership and management of local resources, properties, or facilities by members of the community. This model allows community members to have control over important assets, ensuring they are used in ways that benefit the community as a whole.
- **Land justice:** The fair and equitable distribution, use, and stewardship of land, ensuring that all people – particularly marginalized and indigenous communities – have access to and control over land resources.
- **Racial equity:** The condition in which individuals, regardless of their race, have equal access to opportunities, resources, and treatment – resulting in fair and just outcomes for all.
- **Shared ownership:** A model where ownership of an asset, such as property or a business, is divided among multiple parties. Each party holds a percentage of the ownership, allowing them to share the costs, benefits, responsibilities, and decision-making associated with the asset.
- **Social purpose real estate:** A property that is developed, owned, or managed with the primary goal of achieving social, environmental, or community benefits, rather than maximizing financial profit.



SECTION 4

CONCLUSION

CONSIDERATIONS FOR SUCCESS

As we embark on the implementation of our strategy, we will keep in mind the following considerations for success:



- We will commit to doing our best work, as it is what marginalized communities deserve on their journey toward community ownership of community assets.
- We will maintain our focus on internal alignment and enhance collaboration among team members to carry forward the synergy from planning into implementation.
- We will continue to recruit and retain mission-aligned staff and continue to strengthen our internal organizational culture.
- We will monitor our progress toward our objectives by using precise metrics for success, making sure we're making strong progress and adjusting our course when necessary.
- We will leverage our close partnerships with aligned organizations to share resources, create greater access for target communities, and amplify our reach and impact.
- We will continuously monitor the evolving political and community development to identify synergies and opportunities for launching new programs and stay alert to policy shifts that might adversely affect the communities we serve.
- We will disseminate tools, insights, and frameworks we develop for use by other CDFIs, fostering knowledge exchange and enhancing the effectiveness of CDFIs serving BIPOC communities.



OUR HOPE FOR THE FUTURE

We are filled with optimism for the future of our organization and the communities we serve. Community Vision is proud of what our team has accomplished so far, and we know there is more work to be done. We are committed to delivering deeper mission impact by continuing to sharpen our approach in the same relational and client-centered manner that has gotten us to where we are today.

We fundamentally believe that communities should own the resources around them, and we are dedicated to promoting land justice through social purpose real estate acquisition for BIPOC-serving nonprofits. We know this work is best done in close collaboration with communities and partners, and we look forward to driving impact together.

We are grateful for the trust and support of our clients, communities of color, donors, staff, board, and partners. We invite you to join us in our vision of a more equitable and sustainable future.



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